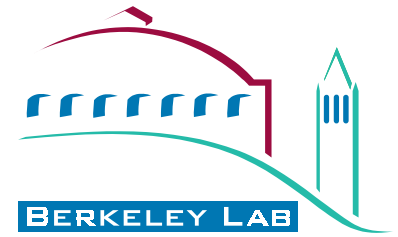
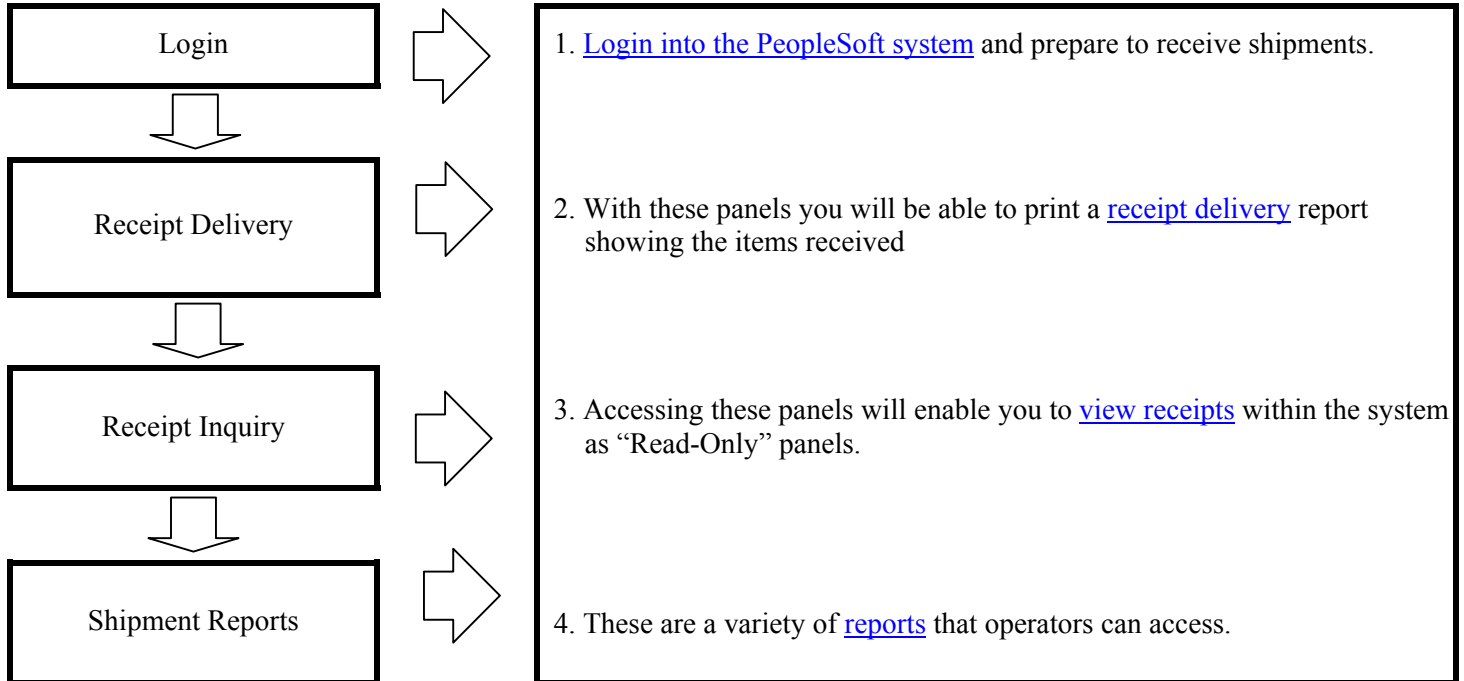


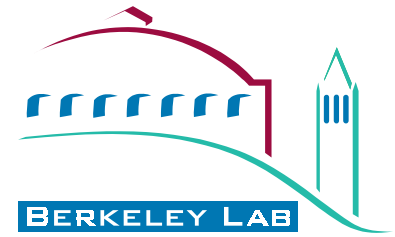
Receiving Reports



This document will provide training on several additional reports available.



Receiving Reports



Step 1: Login

- Launch the PeopleSoft Signon from the Novel Application launcher.
 - Connection type “Oracle” (Defaulted)
 - Database Name “FMSPRD” (Defaulted)
 - Enter your login name. (UPPERCASE only)
- Password is left blank.
- Click “OK”

PeopleSoft Signon

PEOPLE
Soft

PeopleTools 7.62
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Enter Signon Information Below:

Connection Type: Oracle

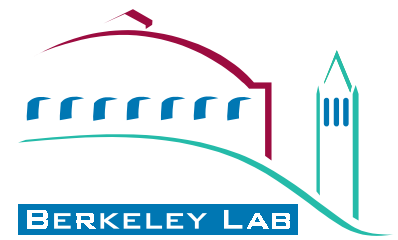
Database Name: FMSPRD

Operator ID: JPSPEROS

Password:

OK Set Password... Cancel

Receiving Reports



Step 2: Generating the Receipt Delivery Report

After the system receiving is complete, you print the Receipt Delivery Report.

- ⇒ Go
- ⇒ Administer Procurement
- ⇒ Manage Shipments
- ⇒ Report
- ⇒ Receipt Delivery
- ⇒ Update/Display

In the Run Control ID field, type **Receipt Delivery**

Click **OK**.

The Parameters panel displays.

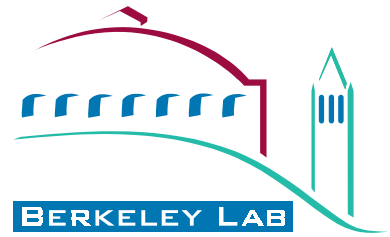
From the **Business Unit** drop-down list, select **LBNL**.

In the **Recy No** field, type in the appropriate **Receiver ID**.


In the **From Date** field, type the appropriate date.

In the **Thru Date** field, type the appropriate date.

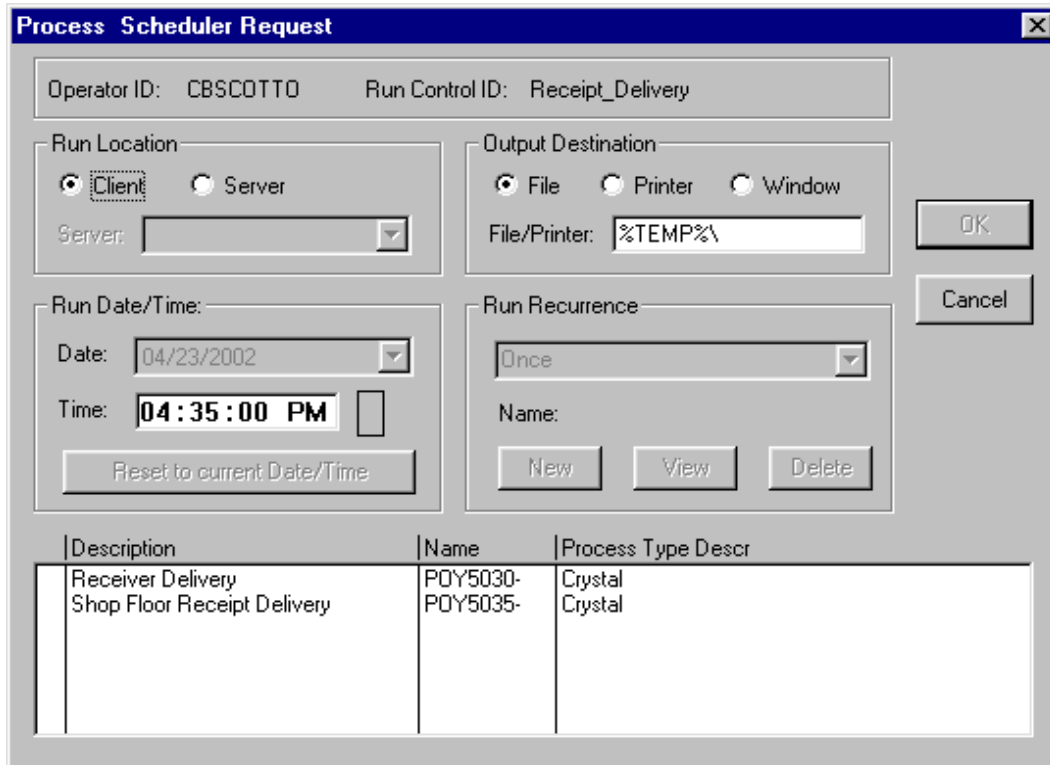
Receiving Reports



NOTE: The use of the date fields as the select criteria, the **Receiver ID** field becomes inactive.

On the toolbar, click the **Run**  button.

The Process Scheduler Request dialog box displays.



The dialog box is titled "Process Scheduler Request". It contains the following fields and controls:

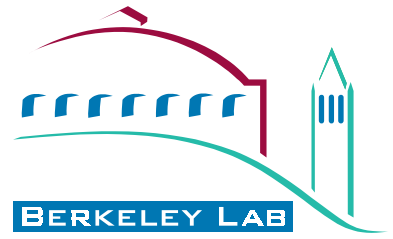
- Operator ID:** CBSCOTTO
- Run Control ID:** Receipt_Delivery
- Run Location:** Radio buttons for **Client** (selected) and **Server**. A **Server:** dropdown menu is below.
- Output Destination:** Radio buttons for **File** (selected), **Printer**, and **Window**. A **File/Printer:** text field contains "%TEMP%\".
- Run Date/Time:** **Date:** 04/23/2002 (dropdown), **Time:** 04:35:00 PM (text field). A **Reset to current Date/Time** button is below.
- Run Recurrence:** **Once** (dropdown). **Name:** text field. **New**, **View**, and **Delete** buttons are below.
- Buttons:** **OK** and **Cancel** buttons are on the right.
- Table:**

Description	Name	Process Type Descr
Receiver Delivery	POY5030-	Crystal
Shop Floor Receipt Delivery	POY5035-	Crystal

Complete the following panel elements:

PANEL ELEMENT	DESCRIPTION	TRAINING EXAMPLE
Run Location	Where the process will run: <ul style="list-style-type: none"> Client - process runs on your workstation. Server - process runs on the server. 	Click Client
Output Destination	Where the system will send the output of the process. <ul style="list-style-type: none"> File - sends the output to a file on a disk. Printer - sends the output to a printer Window - displays the output on your computer 	Click Window

Receiving Reports



In the **Description** list box at the bottom of the dialog box, select **Receipt Delivery Document**.

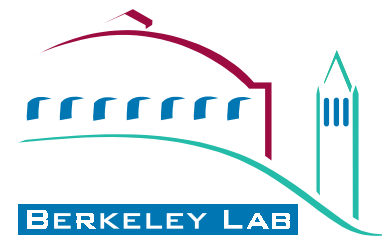
Click **OK**.

The Crystal Reports window opens and displays a copy of the Receipt Delivery Report.

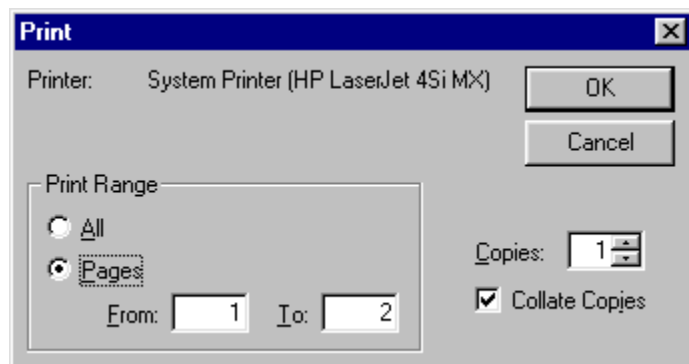
The image shows a Crystal Reports window titled "c:\user\crw\eng\poy5030-.rpt". The window has a toolbar with navigation and printing icons. The report content includes a header section with the "PEOPLE Soft" logo, report details (Report ID: POY5030, Operator ID: CBSCOTTO, Run Control: Receipt Delivery), and page information (Page No. 1, Run Date 04/23/2002, Run Time 4:37:35 PM). Below this is a "RECEIPT DELIVERY DETAIL REPORT" section with fields for Location (001-0105B), Office, Receiving BU (10411), Vendor (ALCATEL), Receipt Date (04/23/2002), Receipt Status (Received), and Bill of Lading. A table at the bottom lists items with columns: Recv Ln, Item ID, Item Description, Accepted Qty, UOM, Due Date, Purchase Order, Regulation, Delivered To, and Delivery Date. The table contains one row with Item ID "TASER" and Accepted Qty "1.00".

On the toolbar of the **Crystal Reports** window, click the **Print** button.

Receiving Reports




The Print dialog box displays.



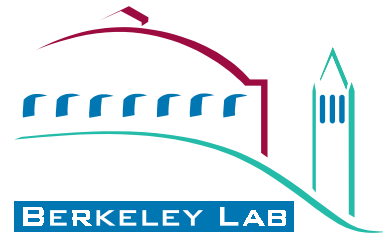
Click **OK**.

The Receipt Delivery Report prints on the designated printer.

Close the **Crystal Reports** window.

On the toolbar, click the **Cancel**  button.

Receiving Reports



Step 3: Inquiring on Receipts

Information on PeopleSoft Inquiry panels is for information only; you **cannot** change it.

- ⇒ Go
- ⇒ Administer Procurement
- ⇒ Manage Shipments
- ⇒ Inquire
- ⇒ Receipts
- ⇒ Receipts

The Update/Display - Receipts dialog box displays.

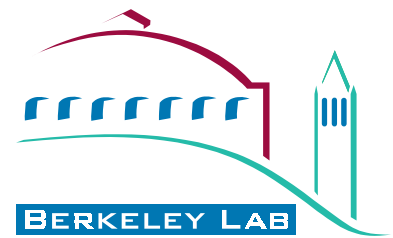
Unit	Recv No	Lading	PO Unit	Long Descr
------	---------	--------	---------	------------

The **Business Unit** LBNL will default into the business unit field.

Click **OK**.

The list box at the bottom of the dialog box displays a list of all receipts.

Receiving Reports



Update/Display -- Receipts

Business Unit: **LBNL** [v]
Receiver ID Number: []

Bill of Lading: []
PO Business Unit: [v]
Item ID: [v]
Origin: []
Purchase Order: [v]
Ship To Location: [v]
Shipment Number: []
Vendor ID: [v]
Received Date: [v]

OK
Cancel
Search
Detail
Use Query
New Query

Unit	Recy No	Lading	PO Unit	Long Descr
LBNL	0000000082		LBNL	LASER
LBNL	0000000082		LBNL	TASER
LBNL	0000000081		LBNL	testing partial
LBNL	0000000080		LBNL	testing again
LBNL	0000000079		LBNL	testing again
LBNL	0000000078		LBNL	TESTING
LBNL	0000000077		LBNL	TESTING
LBNL	0000000076		LBNL	TESTING
LBNL	0000000075		LBNL	Chemical - Type I Hazard

Select a receipt from the list and double click on it.

Manage Shipments - Inquire - Receipts

File Edit View Go Favorites Use Process Inquire Report Help

Receipts | Schedule | Receipt Status | Comments

Unit: **LBNL** Recy No: **0000000082** ALCATEL

Receipt Status: **Received** Received Date: **04/23/2002** []

Ship To Location: **069** WILL CALL - LBNL

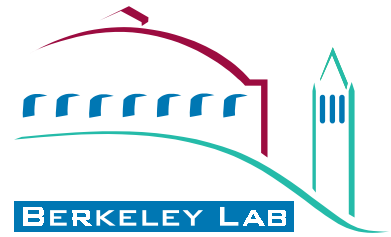
Recy Line	Item ID	Long Description	Purchase Order	Line Num	Vndr UOM	Receipt Qty	Config Code
1	1	LASER	[x] VIK1	1	EA	2.00	
2	2	TASER	[x] VIK1	2	EA	1.00	

[] Receipts [] Update/Display

The Receipts panel shows general receiver information, such as the Item ID of the received material, its description, PO number, and quantity received.

More fields exist than the panel can display at one time. Use the bottom, horizontal scroll bar to view the additional fields on the right.

Receiving Reports



When the panel first displays, some of the fields may be too small to display all the data they hold. This is often the case with **Item ID** field. You can make the fields larger to display all the data to hold. To enlarge a field, click on the solid vertical line to the right of its heading field, hold down the left mouse button, and drag the line to the right. Make the field smaller by dragging the line back to the left.

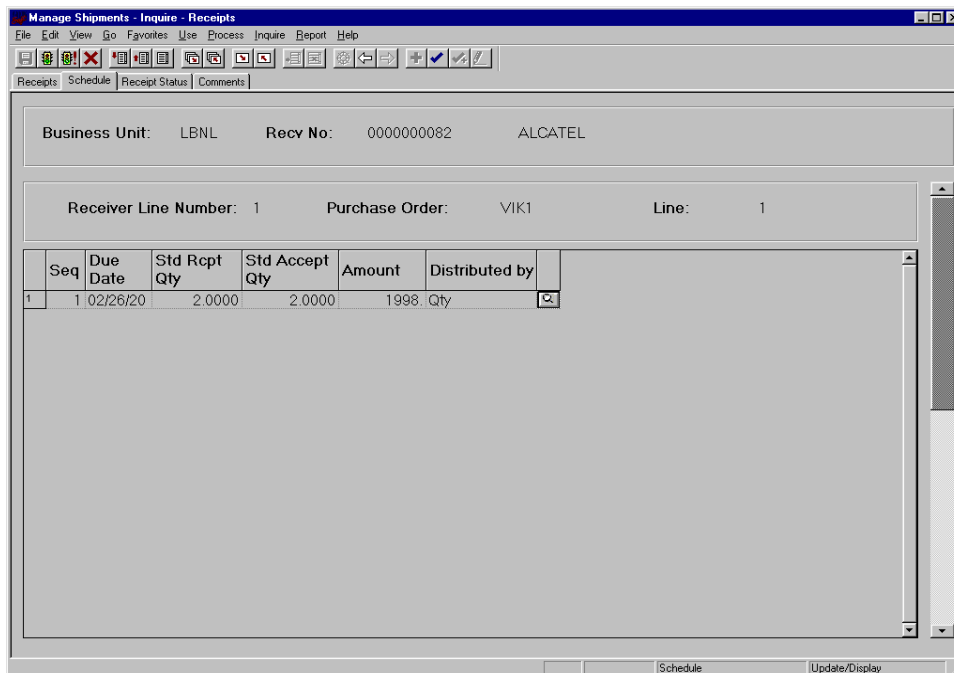
For additional information, such as the Receiver Source of the PO or Match Status, click the **More**

Information  button.

To view the full long description of the item, click the **Show Description**  button.


Click the **Schedule** tab.

The Schedule panel displays.

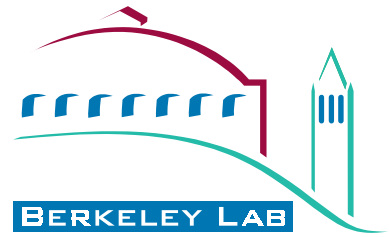
The screenshot shows a software window titled "Manage Shipments - Inquire - Receipts". It has a menu bar (File, Edit, View, Go, Favorites, Use, Process, Inquire, Report, Help) and a toolbar with various icons. Below the toolbar are tabs: Receipts, Schedule, Receipt Status, and Comments. The "Schedule" tab is active. The main area displays fields for "Business Unit: LBNL", "Recv No: 0000000082", and "ALCATEL". Below these are "Receiver Line Number: 1", "Purchase Order: VIK1", and "Line: 1". A table with the following columns is shown: Seq, Due Date, Std Rcpt Qty, Std Accept Qty, Amount, and Distributed by. The first row contains the values: 1, 02/26/20, 2.0000, 2.0000, 1998, and Qty. A small magnifying glass icon is next to the "Qty" field. At the bottom of the window are buttons for "Schedule" and "Update/Display".

The **Schedule** panel displays schedule information, such as the due date of the item.

As with the **Receipts** panel, the field size can be changed by dragging the borders.

To view accounting data, click the **Schedule Details**  button.

Receiving Reports



Click on the **Receipts Status** tab.

The Receipt Status panel displays.

The screenshot shows a software window titled "Manage Shipments - Inquire - Receipts". It has a menu bar (File, Edit, View, Go, Favorites, Use, Process, Inquire, Report, Help) and a toolbar. Below the toolbar are tabs: Receipts, Schedule, Receipt Status, and Comments. The "Receipt Status" tab is active. The main area displays information for a specific receipt:

Business Unit: LBNL Recv No: 0000000082 ALCATEL

Line: 1 Item: LASER [Show Description Icon] EA

Receiver Line Status: Received Recv Qty: 2.0000

Lot Assigned Status: Complete Insp Qty: 0.0000


Inspection Status: Complete Accept Qty: 2.0000

Serialization Status: Complete Reject Qty: 0.0000

Sched Num	Ship Status	Quantity	Ship Date Status	Due Date	Recv Qty	Insp Qty	Accept Qty	Reject Qty	Rej Action	Rej Reason	RM Nu
1	1	Received Qty OK	Late Ship	02/26/200	2.00		2.00				

At the bottom of the window are buttons for "Receipt Status" and "Update/Display".

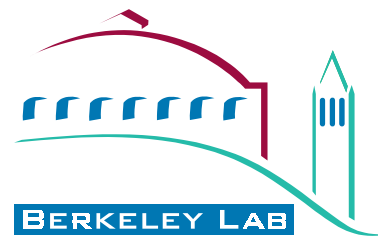
The **Receipts Status** panel provides status information, as well as data relating to inspected and rejected shipments.

To view the full long description of the item, click the **Show Description**  button.

More fields exist than the panel can display at one time. Use the bottom, horizontal scroll bar to view the additional fields on the right.

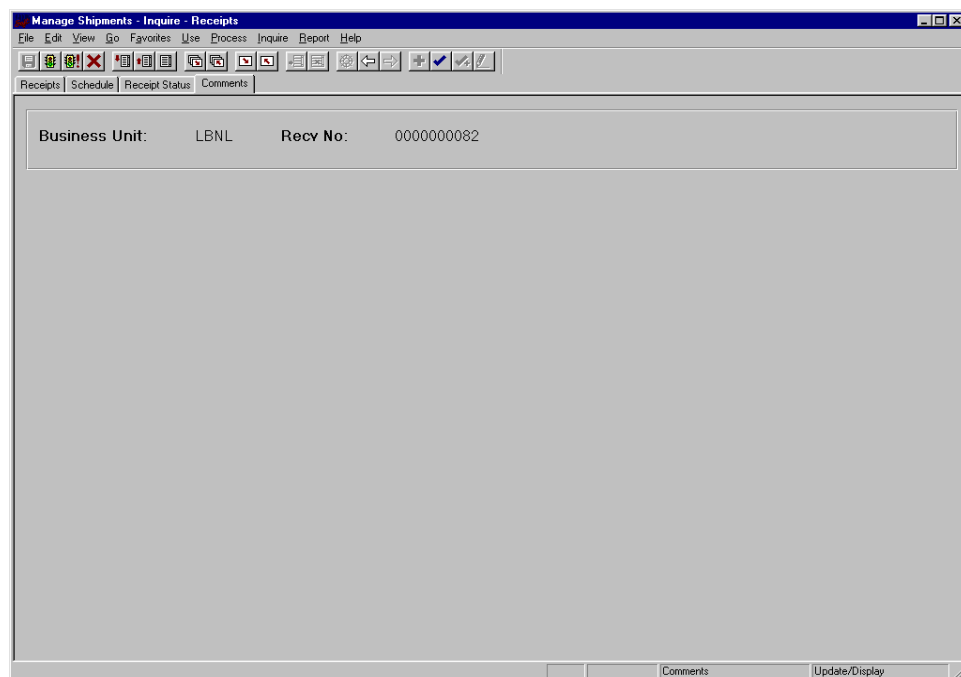
As with the other inquiry panels, you can change the size of the fields by dragging the borders.

Receiving Reports




Click the **Comments** tab.


The Comments panel displays.



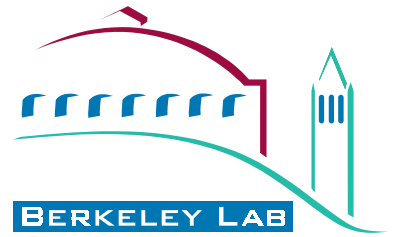
The **Comments** panel displays any comments that have been entered about the receipt.

To view the full long description of the item, click the **Show Description**  button.

As with the other inquiry panels, you can change the size of the fields by dragging the borders.

When finish viewing the inquiry data, click the **Cancel**  button.

Receiving Reports



Step 4: Manage Shipment Reports

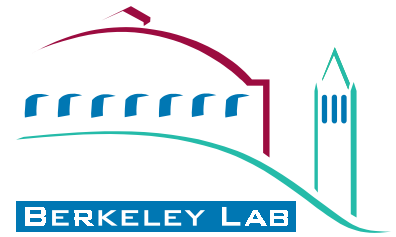
In PeopleSoft, there are a variety of reports that operators can access. The following reports can be access through the Manage Shipments report panel. Each panel has its own unique set of parameters. Each report has up to several variations of the specific report that can be processed. Each report is delivered in a Crystal format.

Receiver Summary

The screenshot shows a PeopleSoft window titled "Manage Shipments - Report - Receiver Summary". The window has a menu bar (File, Edit, View, Go, Favorites, Use, Process, Inquire, Report, Help) and a toolbar with various icons. The main area is divided into sections. The "Receiver Summary" section contains fields for "Operator ID" (SCOTTOC), "Run Control ID" (RECEIVERSUM), and "Language" (English). Below this is the "Report Request Parameters" section, which includes "From Date" (01/01/2001), "Through Date" (05/01/2001), and "Business Unit" (CHP01). At the bottom of the window, there is a status bar with the text "FS75QA2 Receiver Summary Add".

Description	Name	Process Type Descr
Receiver Summary Report	POY5001-	Crystal

Receiving Reports



Receiver ShipTo Detail

Manage Shipments - Report - Receiver Shipto Detail

File Edit View Go Favorites Use Process Inquire Report Help

Receiver Shipto Detail

Operator ID: SCOTTOC

Run Control ID: RECEIVERSUM Language: English

Report Request Parameters

From Date: 01/01/2001 Through Date: 05/01/2001

Business Unit: CHP01

FS75QA2 Receiver Shipto Detail Update/Display

Description	Name	Process Type Descr
Receiver Shipto Detail Report	POY5010-	Crystal

Receiver Account Detail

Manage Shipments - Report - Receiver Account Detail

File Edit View Go Favorites Use Process Inquire Report Help

Receiver Account Detail

Operator ID: SCOTTOC

Run Control ID: RECEIVERACCT Language: English

Report Request Parameters

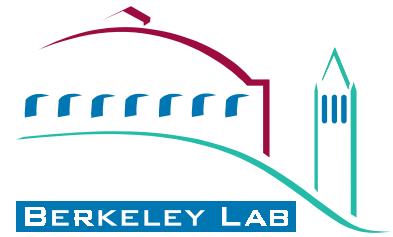
From Date: 01/01/2001 Through Date: 05/01/2001

Business Unit: CHP01

FS75QA2 Receiver Account Detail Add

Description	Name	Process Type Descr
Receiver Account Detail Report	POY5020-	Crystal

Receiving Reports



RTV Details

Manage Shipments - Report - RTV Details

File Edit View Go Favorites Use Process Inquire Report Help

RTV Details

Operator ID: SCOTTOC

Run Control ID: RTVDETAIL Language: English

Report Request Parameters

Business Unit: CHP01 RTV ID:

Return Status:

FS75QA2 RTV Details Add

Description	Name	Process Type Descr
Return To Vendor Detail Report	POY5050-	Crystal

RTV Credits

Manage Shipments - Report - RTV Credits

File Edit View Go Favorites Use Process Inquire Report Help

RTV Credits

Operator ID: SCOTTOC

Run Control ID: RTVDETAIL Language: English

Report Request Parameters

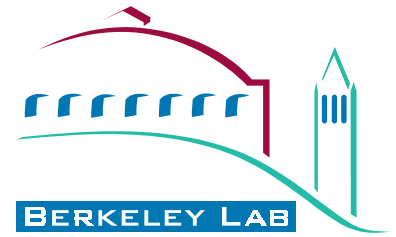
From Date: 01/01/2001 Through Date: 05/01/2001

Business Unit: CHP01

FS75QA2 RTV Credits Update/Display

Description	Name	Process Type Descr
RTV Credits Report	POY5060-	Crystal

Receiving Reports



RTV Credits

Manage Shipments - Report - Receipt Accrual Report

File Edit View Go Favorites Use Process Inquire Report Help

Receipt Accrual

Operator ID: SCOTTOC

Run Control ID: RTVDETAIL

Language: English

Report Request Parameters

Business Unit: CHP01

Receiver ID Number:

As of Date: 03/08/2001

FS75QA2 Receipt Accrual Update/Display

Description	Name	Process Type Descr
Receipt Accrual Report	POY7000-	Crystal